



**MANDELA WASHINGTON
FELLOWSHIP**
FOR YOUNG AFRICAN LEADERS

2023 Leadership Institute: Budget Narrative Template

Applicants are required to submit a budget narrative along with their budget worksheet using the template below. Each line item listed in the budget worksheet must include a detailed description in the budget narrative of the activities supported, as well as an explanation of how the cost was derived. If a line item includes both ECA-requested funds and cost-share funds, please ensure that the amounts for each funding category (ECA/Cost Share) are noted in the Budget Summary section of the narrative template.

Please use the template headings as outlined in this document to organize your budget narrative and ensure all information required by the budget guidelines is addressed. This title page and the descriptive text under each heading should be deleted.

REFERENCE ONLY



[Educational Institution or Organization Name]

2023 Leadership in [Business/Civic Engagement/Public Management] Institute
Budget Narrative

Budget Summary

[Use this section to input the subtotal breakdowns from the Summary Budget tab of your budget worksheet.]

Cost Description	Subaward Requested Funds	Cost-Shared Funds	IREX-Provided Debit Card	Total Cost
Administrative Costs				
Program Costs				
Indirect Costs				
Total Costs				

Administrative Costs

Staff Costs

[Use this section to describe the anticipated total of all key Institute personnel salary and benefits costs and explain how these amounts were calculated. All budgeted personnel costs should fall within the anticipated eight-month period of performance from January 15, 2023, to September 15, 2023.]

Salaries

[In this section, include an entry for each staff member listed on the budget worksheet and note who will fulfill the key roles of Administrative Director, Academic Director, Leadership Manager, and support staff.

Please use one of the models below to describe how these costs were derived:

If using Percentage of Effort. Ms. Jones has a base salary of \$52,000 and will devote 40% of her effort from January 15 to September 15, 2023, to Institute planning and implementation. $\$52,000 / 12 \text{ months} = \$4,333 \times 8 \text{ months} \times 40\% = \$12,132$.

If using Daily Rate of Pay. Dr. Smith is on a nine-month appointment at a salary of \$75,000. Dr. Smith will devote 30 days to Institute planning and implementation. $\$75,000 / 168 \text{ (# of duty days in an academic year)} = \$446 \text{ daily salary} \times 30 \text{ days devoted to the program} = \$13,380$.

If using Hourly Rate of Pay. Two graduate students will provide additional support during Institute implementation. They will be scheduled for 30 hours per week for 6 weeks at an hourly rate of \$18.00. $\$18 \times 30 \text{ hours} \times 6 \text{ weeks} \times 2 \text{ graduate students} = \$6,480$.

Benefits

[Use this section to explain how benefits will be calculated for each of the staff members listed in the budget worksheet according to your institutional policy. As part of your description, state the

appropriate fringe rate for each staff member listed (i.e., full-time, part-time, consultant, graduate student, etc.) and ensure that it matches the rates reflected on your institution's confirmed Negotiated Indirect Cost Rate Agreement (NICRA).]

Other Direct Expenses

[Describe any expenses included in your budget worksheet which are directly attributable to the project **and** not accounted for in Indirect Costs (i.e., phone, fax, postage, copying, printing, office supplies, etc.). If there are any staff-related travel expenses not related to the Institute Partner Planning Retreat or the Summit, please include those in this section as well. Provide information about how the cost of each expense was calculated.]

Common Leadership Curriculum (CLC) Supplies and Materials

[Institutes should include up to \$500 in their budget to cover costs for CLC supplies and materials, per guidance noted in the RFA. \$500 is the estimated cost of one full CLC supply kit for one cohort. IREX will confirm the final list of materials in Spring 2023; please use the 2022 [CLC Facilitator Guide](#) as a reference.]

Optional Facilitator Training - Successful Strengths Coaching

[If you choose to include costs for designated staff/faculty to become CliftonStrengths®-trained to facilitate CLC Sessions 2 and 3, include a description of those costs listed in your budget worksheet and explain how they were derived in this section. These costs may include the registration fee, at the prevailing rate, for the [Successful CliftonStrengths® Coaching](#) course for the designated staff/faculty CLC facilitator as well as associated travel and per diem costs at U.S. Government per diem rates: www.gsa.gov/perdiem. If travel is required to complete this training, please indicate in which city the training will take place as part of your explanation. If known, include the name and program role of the facilitator to be trained in the budget narrative.]

Additional Institute Staff Travel Costs

[Use this section to describe any costs listed in your budget worksheet for additional Institute staff to attend the Institute Partner Planning Retreat and the Mandela Washington Fellowship Summit. As a reminder, IREX will cover the cost for two Institute staff members to participate in the Planning Retreat, one of whom should be the Institute's designated Leadership Manager, and one Institute staff member to attend the Mandela Washington Summit in late July.]

Institute Partner Planning Retreat

[Institute Staff Travel for Planning Retreat](#)

[Use this section to describe how round-trip travel costs listed in the budget worksheet were calculated. Include information about the mode of transportation, city of origin, and the total anticipated cost for each additional optional staff member to travel to the Institute Partner Planning Retreat in Washington, D.C., in early 2023.]

Institute Staff Lodging for Planning Retreat

[Use this section to describe how lodging costs listed in the budget worksheet were calculated and ensure that the cost of lodging charged to the grant does not exceed established U.S. Government per diem rates for Washington, D.C., which can be found at www.gsa.gov/perdiem. Lodging for additional optional staff traveling to the Institute Partner Planning Retreat should be budgeted for a maximum of 3 nights. For new partners who will attend the New Partner Orientation, a maximum of 4 nights of lodging can be budgeted based on anticipated travel needs.]

Institute Staff Per Diem for Planning Retreat

[Use this section to describe how per diem costs listed in the budget worksheet were calculated and ensure that the total per diem rate charged to the grant for these individuals does not exceed established U.S. Government per diem rates for meals and incidentals, which can be found at the following site: www.gsa.gov/perdiem. Per diem for staff traveling to the Institute Partner Planning Retreat should be budgeted for a maximum of 4 days. For new partners who will attend the New Partner Orientation, a maximum of 5 days of per diem can be budgeted.]

Summit

Institute Staff Travel for Summit

[Use this section to describe how round-trip travel costs listed in the budget worksheet were calculated. Include information about the mode of transportation, city of origin, and the total anticipated cost for each additional staff member to travel to the Summit in Washington, D.C., in July 2023.]

Institute Staff Lodging for Summit

[Use this section to describe how lodging costs listed in the budget worksheet were calculated and ensure that the cost of lodging charged to the grant does not exceed established U.S. Government per diem rates for Washington, D.C., which can be found at www.gsa.gov/perdiem. Lodging for additional staff traveling to Summit should be budgeted for a maximum of 4 nights.]

Institute Staff Per Diem for Summit

[Use this section to describe how per diem costs listed in the budget worksheet were calculated and ensure that the total per diem rate charged to the grant for these individuals does not exceed established U.S. Government per diem rates for meals and incidentals, which can be found at the following site: www.gsa.gov/perdiem. Per diem for staff traveling to the Summit should be budgeted for a maximum of 5 days.]

Program Costs

Per Participant Program Costs

Institute Lodging and Per Diem

Lodging

[Use this section to describe the lodging that will be provided to Fellows and indicate how the costs listed in the budget worksheet were calculated. The cost of Fellow lodging may not exceed established U.S. Government per diem rates for each location, which can be found at www.gsa.gov/perdiem.

As part of your description, confirm that the lodging is budgeted for 39 nights and includes linens, towels, basic bathroom supplies (toilet paper/cleaning products), access to basic cooking supplies and utensils (if relevant), and access to the internet.

As a reminder, given that Fellows are mid-career professionals and for public health reasons, single rooms for Fellows, defined as an individual bedroom with a door, are recommended but not required. However, suite arrangements are also acceptable, provided each Fellow has their own bed. Please clearly indicate the type of layout budgeted for in your description.]

Meals & Incidentals

[Use this section to describe the costs listed in your budget worksheet related to providing breakfast, lunch, and dinner to your Fellows for 40 days during the Institute, as well as any incidentals. Provide details about how these costs were calculated.

As part of your description, indicate how meals will be provided in your institution's context, which typically includes various means such as campus meal cards, group meals, and monies provided directly to support grocery shopping and/or eating in local restaurants. If you plan to use an IREX-provided debit card to provide meal monies and incidentals to Fellows, please indicate this as part of your description.

As a reminder, monies for Fellow meals must be reasonable to provide the planned number of meals for the local cost of living. In addition, they may not exceed established U.S. Government per diem rates for that meal (breakfast, lunch, or dinner) for each attendee and location, which can be found at www.gsa.gov/perdiem.]

Institute Textbooks and Materials

[Use this section to describe the costs listed in your budget worksheet related to providing Institute textbooks and materials and describe how these costs were derived. As a reminder, this section refers to material costs that are budgeted per participant. Education costs that are not per participant should be included under the "Education Materials" section of the budget.

Fellows should be provided with a certificate of Institute completion at the end of the program, signed by the program director, bearing the name of the leadership track, and stamped with the institution's seal. Please include any related costs in this section of the budget worksheet and narrative.

Additionally, while laptops and like materials should not be purchased for each Fellow for parity, they may be rented. Cell phones will be provided for Fellows by IREX and should not be included in Institute budgets.]

Supplemental Allowance

[All Institute budgets must include a \$650 per Fellow stipend to cover the following expenses: Book and Cultural Allowances (\$200 per Fellow) and Incidentals Stipend (\$450 per Fellow). This stipend must be distributed directly to Fellows upon arrival at their Institutes to use at their discretion. In this section, please indicate how you will provide these funds to Fellows and whether you will use the IREX-provided debit card option to do so.]

Participant Admissions

[Use this section to describe how costs were derived for each participant admission cost listed in the budget worksheet, including for any cultural, academic, and other mandatory group activities planned as part of the Institute program.]

Tax Withholding

[All amounts listed in other budget line items should be the totals, not including any applicable taxes that have been withheld, and should not reduce the meals or supplemental stipend amounts noted above.]

Institute-Specific Tax Withholding

[Use this section to describe any costs related to required tax withholding for funds provided directly to participants per your institution's guidelines. Include a clear description of how these costs were calculated.]

As a reminder, IREX is not permitted to give tax advice. Institutes are solely responsible for determining and withholding taxes on funds provided directly to participants per their institution's guidelines.]

IREX-Provided Debit Card Tax Withholding

[If you are requesting to provide funds directly to Fellows via an IREX-provided debit card, you must include an additional 14% tax withholding to offset IREX's tax liability in distributing these funds to Fellows. These monies are considered part of your budget and are reduced from the total available subaward amount of \$225,000.]

Use this section to confirm that an additional 14% tax withholding is being applied to relevant funds and describe how the calculations were derived.]

As a reminder, all amounts listed in other budget line items should be the totals, not including any applicable taxes that have been withheld, and the meals or supplemental stipend amounts noted above should not be reduced to cover tax withholding.]

General Program Costs

Guest Speaker Honoraria

[Use this section to describe how calculations in your budget worksheet were derived for honoraria provided to all guest speakers or facilitators who are not compensated by the subaward on a salaried

basis. Guest Speaker Honoraria cannot exceed \$250 per day for preparation and delivery. However, costs above the \$250 per day rate may be cost-shared.]

Guest Speaker Lodging

[Use this section to describe how calculations in your budget worksheet were derived for guest speaker lodging, if applicable. Please note that the cost must not exceed established U.S. Government per diem lodging rates for your city, which can be found at www.gsa.gov/perdiem. Costs above the federal per diem rate may be cost-shared.]

Guest Speaker Travel

[Use this section to describe how calculations in your budget worksheet were derived for guest speaker travel, if applicable. As part of this description, please include the city of origin and mode of transportation.]

Guest Speaker Per Diem

[Use this section to describe how calculations in your budget worksheet were derived for guest speaker per diem, if applicable. Please note that the cost must not exceed established U.S. Government per diem rates for your city, which can be found at www.gsa.gov/perdiem. Costs above the federal per diem rate may be cost-shared.]

Educational Materials/Networking Activities

[Use this section to describe how calculations were derived for any line items in your budget worksheet related to educational materials and networking activities. These expenses may include group access to educational portals, leadership modules, and other curricular resources for the Institute, in addition to expenses related to planned networking activities.]

Airport Transportation

[Use this section to describe how costs were calculated for airport transfers to the Institute from the **nearest international airport** as well as return to the airport for departure to the Summit. As part of your description, include the name of your nearest international airport and the mode of transportation that will be used.

As a reminder, Fellows will **arrive** at the Institutes as individuals/in small groups and **depart** for Summit as a single group, so transportation to and from the airport should be planned accordingly. Locations within driving distance of Washington, D.C. will travel to the Summit via coach, paid for directly by IREX.]

Ground Transportation

[Use this section to describe how costs were calculated for any bus/van/taxi rentals needed to complete all site visits, community service, cultural excursions, networking, grocery shopping, etc., during the Institute. As part of your description, please include the type of transportation provided and how many passengers each vehicle can hold, ensuring that all 25 Fellows plus any Institute staff chaperones can be accommodated.

As a reminder, if internal university/institution rentals are utilized, they should be procured at cost or competitively procured externally.]

Group Meals

[Use this section to describe how costs were calculated for each group meal listed in the budget worksheet. Costs for group meals may not exceed established U.S. Government per diem rates for that meal (breakfast, lunch, or dinner) for each attendee and location, which can be found at www.gsa.gov/perdiem.]

Welcome/Farewell Events

[Use this section to describe how costs were calculated in the budget worksheet for the required welcome and farewell events. As a reminder, costs for the welcome and farewell events cannot exceed \$45 per person with a maximum ratio of two guests per Fellow (50 guests + 25 Fellows = 75) unless additional expenses are cost-shared.]

Medical Contingencies

[Use this section to outline the required \$1,000 budget line item to cover medical contingencies, including costs for COVID-19 prevention and response based on institutional protocols. This should include routine costs for testing, vaccines, or boosters for COVID-19 and other illnesses as required by the hosting institution; basic personal protective equipment (PPE); and housing or meal support for Fellows in isolation, among other medical expenses. Medical contingency funds may be included as cost share or as an allowable expense under grant-requested funds and may be greater than \$1,000. A university health insurance or benefits plan to supplement ASPE coverage may be included in the budget as cost share.

If a university health insurance or benefits plan will be provided as cost-share to supplement ASPE coverage, please note that in this section as well.]

Indirect Costs

[Use this section to clearly describe how indirect costs are calculated on your budget worksheet, if applicable. As part of your description, include an explanation of the expenses included in your base direct cost calculations as well as what indirect cost rate has been applied.

As a reminder, the indirect cost rate used in your calculations must match your institution's NICRA or similar document from a cognizant agency. Indirect costs can be included as cost share.]